Archiving Historical Data in Membership PLUS

Archiving puts time-sensitive transaction data you are no longer using into storage by removing it from your current data set and storing it in another location. You can access, view, and edit your archive data set, but you cannot add to it.

Generally you'll want to archive data shortly after the end of your organization's fiscal year. Membership Plus provides a wizard that helps you with the procedure.

NOTE: Only deposited contributions can be archived.

Before you archive your Membership Plus data, be sure you have a current backup of your data set.

To launch the Archive Wizard,

- From the **File** menu, choose **Data Set Maintenance**, then choose **Archive** from the submenu.

The Archive Wizard is structured as a series of choices and questions, each step contained in one of a sequence of dialog boxes.

Step 1 of the Archive Wizard is to specify the type of data you want to archive. Only time-sensitive data can be archived. Time-sensitive data is directly related to meetings, attendance, member notes, deposits, contributions, and pledges — any piece of data that has a date attached to it — and is significant for a limited time only.

To indicate your selection,

1. Mark the check boxes that correspond to the type(s) of data you want to remove from your current, active data set.
2. For example, you might want to remove all the old data, or maybe you only want to remove the old financial data (and keep the meeting and note data for ongoing use).
3. When you've indicated your selections, click **Next** to proceed.

Step 2 of the Archive Wizard is to specify the time frame for the data you want to remove from your current, active data set. For example, you might want to remove all the data up to the end of the previous calendar or fiscal year. Or maybe you want to keep the previous fiscal year but remove anything older than that.

To specify the date range,

1. Use the month pick lists and year spin buttons to set the beginning and end of the desired date range.
2. All data from the first day of the From month to the last day of the To month will be archived.

3. When you've specified the desired date range, click **Next** to proceed.

Step 3 of the Archive Wizard is to specify the location where the archived data should be placed. Archiving creates a data set that is fully functional (except that you cannot add records to it), so this step is simply a matter of identifying a directory, usually on your hard drive.

To choose a location for the archive data set,

1 Click the **Browse** button, then use the Select Directory dialog box_to identify the desired directory.
- Frequently you may want to create a new directory.
- If you specify a directory that contains a valid non-archive data set, you'll be asked to select a different location.
- If you specify a directory that contains a valid archive data set, the Choose Archive Option dialog box provides additional options.

When you've identified the correct location for the archive data set, click **Next** to proceed.

Step 4 of the Archive Wizard is to perform the archive procedure, removing the old data from the active data set and placing it in the new archived data set.

To begin archiving your data,

- Click the **Continue button**.

A meter bar tracks the progress, and a counter below the meter bar indicates the number of records processed.

When the archive is complete, a report appears in a preview window on your screen. Review and print the report, if necessary, then close the preview window.

Click Close to complete the procedure.

Membership Plus prompts you to reprocess the data in the active data set. Because many records have been removed from the current data set, leaving wasted empty space, it’s a good idea to reprocess at this point.